



The Official Source for Municipal Disclosures and Market Data

EMMA Dataport Manual for 529 Savings Plans/Achieving a Better Life Experience (ABLE) Programs Disclosure Submissions

Version 2.2, December 2024

Revision History

Version	Date	Description of Changes
1.0	June 2010	Initial version.
1.1	May 2011	Updated manual to reflect the voluntary submissions by Issuers of Preliminary Official Statements and Pre-Sale Documents as well as the submission of Issuer Voluntary Official Statements.
1.2	August 2015	Updated the Resources and Support section to reflect the change in hours of operation for Email Support.
1.3	June 2016	Updated to reflect the changes to the msrb.org homepage, MSRB Gateway Login and Main Menu pages.
1.4	June 2018	Updated to reflect the addition of ABLE Program submissions and removed the word “College” from 529 Savings Plans to reflect the Tax Cuts and Jobs Act of 2017.
2.0	August 2021	Updates to reflect EMMA Dataport user interface changes as it relates to the 529 and ABLE EMMA Dataport screens.
2.1	April 2022	Updated to reflect GASB's decision to change Comprehensive Annual Financial Report (CAFR) to Annual Comprehensive Financial Report (ACFR).
2.2	December 2024	Updated to reflect changes to the association of supplements to documents.

Resources and Support

Contact the MSRB

MSRB Support

Phone: 202-838-1330

Email: MSRBsupport@msrb.org.

Live support: 7:30 a.m. – 6:30 p.m. ET.

E-mail support: 7:00 a.m. – 7:00 p.m. ET.

Municipal Securities Rulemaking Board

1300 I Street NW, Suite 1000

Washington, DC 20005

Phone: 202-838-1500

MSRB Website: www.msrb.org

EMMA Website: emma.msrb.org

MSRB Corporate Office

Core Operational Hours

7:00 a.m. to 7:00 p.m. ET on business days*

*Excludes weekends and holidays identified on the [MSRB System Holiday Schedule](#) and planned or unplanned outages as communicated on the [MSRB Systems Status](#) webpage.

Related MSRB Rules and Resources:

[MSRB Rule G-32: Disclosures in Connection with Primary Offerings](#)

[SEC Rule 15c2-12: Continuing Disclosure](#)

Manuals:

- [Primary Market Submission Manual](#)

Video Tutorials:

- [Submitting Primary Market Disclosures for 529 Savings Plans](#)
- [Submitting Voluntary Official Statements for 529 Savings Plans](#)
- [Submitting Continuing Disclosures for 529 Plans](#)

Overview

About the MSRB

The MSRB protects investors, state and local governments and other municipal entities, and the public interest by promoting a fair and efficient municipal securities market. The MSRB fulfills this mission by regulating the municipal securities firms, banks and municipal advisors that engage in municipal securities and advisory activities. To further protect market participants, the MSRB provides market transparency through its Electronic Municipal Market Access (EMMA®) website, the free, official repository for information on all municipal bonds.¹ The MSRB also serves as an objective resource on the municipal market and provides extensive education and outreach to market stakeholders. The MSRB is a self-regulatory organization governed by a board of directors that has a majority of public members, in addition to representatives of regulated entities. The MSRB is overseen by the Securities and Exchange Commission and Congress.

About this Manual

Brokers, dealers, and municipal securities dealers (collectively, dealers) acting in the capacity of an underwriter, placement agent or remarketing agent for offerings of municipal securities and their designated submission agents must submit primary market documents in accordance with applicable MSRB rules. Issuers and their designated submission agents may voluntarily submit primary market documents if the submission includes certain other information.

In accordance with Rule G-32(b)(vi)(C), underwriters may designate agents to make submissions on their behalf through the MSRB's user account management and authentication system known as MSRB Gateway. All submissions made on behalf of an underwriter by a designated agent are the responsibility of the underwriter, and any failure by the designated agent to provide documents or information in a complete, timely and conforming manner will be deemed to be a failure by the underwriter.

This EMMA Dataport Manual for 529 Savings Plans/ABLE Programs Disclosure Submissions provides instructions on the process for: (i) dealers to submit Primary Market documents; (ii) issuers to submit Continuing Disclosure documents; and (iii) issuers to submit on a voluntarily basis 529 Savings Plans/ABLE Programs' disclosure documents provided under their states' 529 Savings Plans/ABLE Programs.

¹ The EMMA website makes available to the public, at no charge, primary market and continuing disclosure information on 529 Savings Plans/ABLE Programs.

This manual only provides instructions on submissions made via the EMMA website through EMMA Dataport. Submitters seeking to make automated continuous submissions through a computer-to-computer interface should consult the appropriate specifications document.



This symbol appears within this manual to call out important information or directions.

This resource is for informational purposes only and should be considered in conjunction with the applicable MSRB rules and any related interpretations. The complete text of all MSRB rules and interpretations is available at <http://www.MSRB.org/Rules-and-Interpretations/MSRB-Rules.aspx>.

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Part 1: Submission Rights and Access to EMMA Dataport

All submitters to the MSRB Primary Market, Continuing Disclosure and Voluntary Issuer Submission Services must have a user account in MSRB Gateway, a single, secure access point for making submissions to EMMA. Each user must also accept the terms and conditions for making submissions.

Primary Market submissions of 529 Savings Plans/ABLE Programs disclosure documents by underwriters under MSRB Rule G-32, or by their designated agents, can only be made by users who have had the primary market submission right assigned to them by their organization's Master Account Administrator within MSRB Gateway. For information on how to establish and maintain the primary market submission right, see the [EMMA Dataport Manual for Primary Market Submissions](#).

Continuing Disclosure submissions of 529 Savings Plans/ABLE Programs documents made by issuers or their designated agents can only be made by users who have created a continuing disclosure submission account in MSRB Gateway. For information on how to establish continuing disclosure submission access, see the [EMMA Dataport Manual for Continuing Disclosure Submissions](#).

Additionally, issuers seeking to make Primary Market submissions, or to designate agents to make submissions on their behalf, must establish an "organization account" in Gateway. Organization accounts are not the same accounts used to make continuing disclosure submissions and are subject to additional verification procedures to affirmatively establish an individual's authority to act on behalf of the issuer in connection with primary market disclosure submissions. Issuers should refer to the [MSRB Gateway User Manual for Issuers, Obligated Persons and Agents](#) for instructions on how to set up an organization account.²

For any submission to the EMMA Dataport, the first step is to log into MSRB Gateway. This can be done on either EMMA or the MSRB homepage.



Dealer staff seeking to make Continuing Disclosure submissions on behalf of an issuer does not need to establish a new account; the ability to make Continuing Disclosure submissions can be assigned to them by their organization's Master Account Administrator within MSRB Gateway.


² Note, that the MSRB Gateway User Manual for Issuers, Obligated Persons and Agents, also describes how to submit documents using the EMMA Dataport user interface.

Step-by-Step Instructions for Accessing EMMA Dataport to Make a 529 Savings Plan/ABLE Submission

1. Access EMMA Dataport

From the EMMA homepage at <http://emma.msrb.org>, click the **EMMA Dataport** link at the top of the page.

Then click the **Login to MSRB Gateway** button.



EMMA[®]

Electronic Municipal Market Access

A service of the MSRB

[EMMA Help](#) | [Contact Us](#)

▶

Advanced Search

Browse Issuers
Tools and Resources ▾
Market Activity ▾
MyEMMA[®] ▾
EMMA Dataport

EMMA Dataport

Overview

Submissions by Dealers

Submissions by Municipal Advisors

Submissions by Issuers

Submissions by Obligated Persons

MSRB Subscription Services

MSRB System Status

Document Submission

EMMA Dataport now features an enhanced user interface and improvements to the continuing disclosure submission process for issuers. [Read more about the changes.](#)

Municipal securities dealers, municipal advisors, issuers, obligated persons and their designated agents provide the Municipal Securities Rulemaking Board (MSRB) with electronic documents to be posted on EMMA. EMMA Dataport is the utility through which submissions of documents and related information are made to MSRB Market Transparency Programs. For information about how to make specific submissions, please click on the applicable link below.

For time sensitive issues call MSRB Support at or send an email to MSRBsupport@msrb.org.


[Submissions by Dealers](#)

[Submissions by Municipal Advisors](#)

[Submissions by Issuers](#)


[Submissions by Obligated Persons](#)

Access EMMA Dataport to Submit Documents




Log in to MSRB Gateway

Don't have an account? [Register ▶](#)

 Access Online Training about Submitting to EMMA


[MSRB Gateway Manual ▶](#)

Free Online Learning



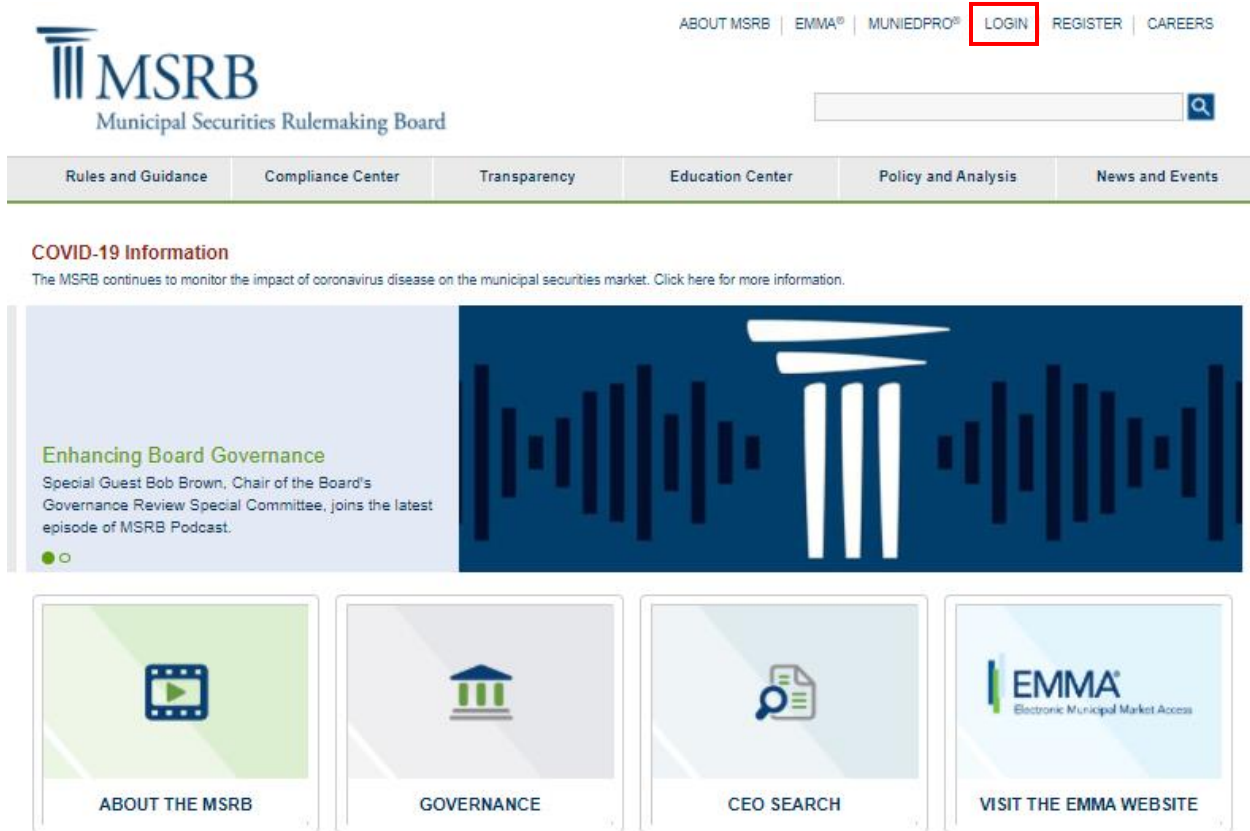
Log in to MuniEdPro[®] to take the MSRB's interactive course on continuing disclosure obligations under SEC Rule 15c2-12.

EMMA for Issuers



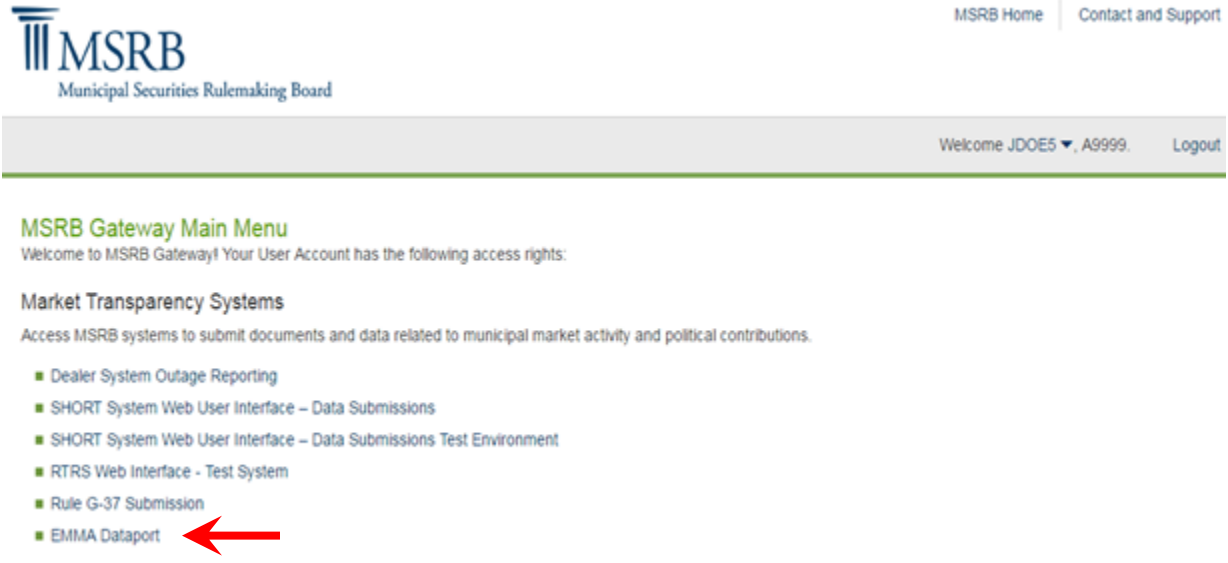
Watch government finance professionals explain how they use EMMA.

You may also access the MSRB Gateway landing page from the MSRB homepage at www.msrb.org, click **LOGIN**.



From the MSRB Gateway landing page, enter your User ID and Password, and click **Login**.

From the MSRB Gateway Main Menu, click **EMMA Dataport**. The EMMA Dataport Submission Screen appears. If the EMMA Dataport link was selected from EMMA then this step won't be necessary. You will automatically be taken to EMMA Dataport.



The screenshot shows the MSRB Gateway Main Menu. At the top left is the MSRB logo with the text "Municipal Securities Rulemaking Board". At the top right are links for "MSRB Home" and "Contact and Support". Below this is a grey bar with the text "Welcome JDOE5 ▾, A9999." and a "Logout" link. The main content area has the heading "MSRB Gateway Main Menu" and a welcome message. Under the heading "Market Transparency Systems", there is a list of links: "Dealer System Outage Reporting", "SHORT System Web User Interface – Data Submissions", "SHORT System Web User Interface – Data Submissions Test Environment", "RTRS Web Interface - Test System", "Rule G-37 Submission", and "EMMA Dataport". A red arrow points to the "EMMA Dataport" link.

MSRB
Municipal Securities Rulemaking Board

MSRB Home | Contact and Support

Welcome JDOE5 ▾, A9999. Logout

MSRB Gateway Main Menu

Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems

Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- Dealer System Outage Reporting
- SHORT System Web User Interface – Data Submissions
- SHORT System Web User Interface – Data Submissions Test Environment
- RTRS Web Interface - Test System
- Rule G-37 Submission
- EMMA Dataport

- 2. Enter an Organization, if applicable.** If your organization has the rights to act on the behalf of another organization, you will see a screen that will allow you to select the organization from the drop-down menu for which you are making a submission.



EMMA Dataport

Welcome to EMMA Dataport, the secure portal for submitting disclosure documents and data to the MSRB. [Read about recent enhancements to EMMA Dataport.](#)

Which organization are you acting on behalf of?

-select one- ▼


Part 2: Primary Market Disclosure Submissions

Creating a New Submission

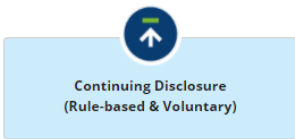
To make a Primary Market submission, you must ensure that you or your organization has the rights to make that submission. If you or your organization has the rights to make a Primary Market submission, you will see the following option.

EMMA Dataport

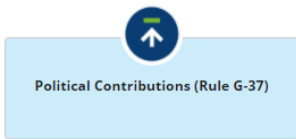
What would you like to do today?



Primary Market (Rule G-32)



Continuing Disclosure
(Rule-based & Voluntary)



Political Contributions (Rule G-37)

Additional Options

529 Savings Plans / ABLE Programs (Rule G-45)

Submit plan descriptive information, assets and other data.

SHORT Documents (Rule G-34)

Submit ARS and VRDO documents.

Issuer Homepage

Enhance investor relations with a customized EMMA homepage.

After selecting Primary Market, the following screen appears. To create/update a submission for a 529 Savings Plan/ABLE Program, select the option using the Municipal Fund Security drop down.

Primary Market (Rule G-32) [Resources](#)

▪ Underwriting/ Remarketing Submission (Standard EMMA Submission- 9-digit CUSIP number required)	Create Update
▪ Commercial Paper (6-digit CUSIP number required)	Create Update
▪ Ineligible for CUSIP Number Assignment	Create Update
▪ Municipal Fund Security	<div><div>Select</div><div><div>Select</div><div>529 Savings Plan</div><div>ABLE Program</div><div>Other Municipal Fund Security</div></div></div>
▪ Advance Refunding Document (Also known as Escrow Deposit Agreement/ Refunding Agreement etc.)	

Pending Submissions

Access completed or partial submissions with expected closing dates on or after today's date

From the drop-down menu, select the state for which you would like to create a new submission. If a state has not previously submitted a plan disclosure document to EMMA, a message will indicate that no plans or programs were found. To submit a new 529 Savings Plan/ABLE Program disclosure document for a selected state, click **Add New Plan**.

EMMA Dataport - 529 Savings Plan [Resources](#)

Search for a Plan

State: [Search](#)

Search Results for State of Michigan (MI) [+Add New Plan](#)

529 Plan Description
MI 529 ADVISOR PLAN
MICHIGAN EDUCATION SAVINGS PROGRAM

Previous **1** Next

[Exit](#)

Plan Tab

On the **Plan** tab, complete the Issue Information.



For a new plan submission, the following notation will appear on the screen:
“Submission Status: Not Published,” which indicates that the 529 Savings Plan, ABLE Program, or Other Municipal Fund Security disclosure document has not been published and cannot be viewed on EMMA.

Submission Status: NOT PUBLISHED

EMMA Dataport - 529 Savings Plan

Resources

Plan

Document

Continuing Disclosure

All applicable fields required for a complete submission.

Issuer Name: STATE OF MICHIGAN

State: MI

Plan Description:

Closing Date:

mm/dd/yyyy

Save

Preview

Exit

When creating a new 529 Savings Plan/ABLE Program submission, the **Plan Description** and the **Closing Date** are required for a complete submission.

The plan description describes the type of 529 Savings Plan/ABLE Program. It is important to describe the plan accurately since this information will appear on the EMMA website and will inform investors about the plan/program.

Submission Status: NOT PUBLISHED

EMMA Dataport - 529 Savings Plan

Resources

Plan

Document

Continuing Disclosure

All applicable fields required for a complete submission.

Issuer Name: STATE OF MICHIGAN

State: MI

Plan Description:

Closing Date: ? mm/dd/yyyy !

Save

Preview

Exit



Since 529 Savings Plans/ABLE Programs are sold through a continuous offering and do not have a specific closing date as other municipal securities do, the closing date represents the date the 529 Savings Plan/ABLE Program is first sold to an investor.

Uploading a Document

Select the **Document tab** to add a 529 Savings Plan/ABLE Program disclosure document or a 529 Savings Plan/ABLE Program disclosure document supplement. Documents on this screen are displayed with the most recently submitted document at the bottom.

Click **Select Files** to find the applicable file on your computer. Then select the file or drag and drop to transfer the file. It is important that prior and subsequent to submission, the submitter reviews each page of the PDF to ensure that it is clear, readable, and word-searchable. EMMA Dataport shows that the document has been uploaded by displaying a document link, type, description, date received, and effective date below the upload box.

Submission Status: NOT PUBLISHED

EMMA Dataport - 529 Savings Plan

← Resources

Plan

Document


Continuing Disclosure

PDF files must be word-searchable by allowing the user to search for specific terms within the document through a search or similar find function. A single file may not exceed 250 MB. All files in a single submission may not exceed 1 GB.

Select Files

or drag and drop files here

Test (2).pdf 12/10/2020

Description: Date Received from Issuer: Effective Date: Select Document Type 

NOTE: The deadline for submission of the official statement to EMMA is the earlier of (1) one business day after receipt of the official statement from the issuer or (2) the issue closing date. Underwriters should submit official statements to EMMA as quickly as possible after receipt. Be advised that large files can take several minutes to upload, depending on your connection speed and the level of traffic on EMMA.

Select document type as an MFS (Municipal Fund Security) Disclosure Document or an MFS Disclosure Document Supplement.

Submission Status: NOT PUBLISHED

EMMA Dataport - 529 Savings Plan

Resources

Plan

Document

Continuing Disclosure

PDF files must be word-searchable by allowing the user to search for specific terms within the document through a search or similar find function. A single file may not exceed 250 MB. All files in a single submission may not exceed 1 GB.

Select Files

or drag and drop files here

Test (2).pdf 12/10/2020

Description:

Date Received from Issuer:

12/01/2020

Effective Date:

12/01/2020

Select Document Type

Select Document Type

MFS Disclosure Document

MFS Disclosure Document Supplement

NOTE: The deadline for submission of the official statement to EMMA is the earlier of (1) one business day after receipt of the official statement and (2) the closing date. Underwriters should submit official statements to EMMA as quickly as possible after receipt. Be advised that large files can take time to upload and may cause a slow connection speed and the level of traffic on EMMA.

Enter the Date Received from Issuer and Document Effective Date.

Submission Status: NOT PUBLISHED

EMMA Dataport - 529 Savings Plan

Resources

Plan

Document

Continuing Disclosure

PDF files must be word-searchable by allowing the user to search for specific terms within the document through a search or similar find function. A single file may not exceed 250 MB. All files in a single submission may not exceed 1 GB.

Select Files

or drag and drop files here

Test (2).pdf 12/10/2020

Description:

Date Received from Issuer:

12/01/2020

Effective Date:

12/01/2020

Select Document Type

Select Document Type

MFS Disclosure Document

MFS Disclosure Document Supplement

NOTE: The deadline for submission of the official statement to EMMA is the earlier of (1) one business day after receipt of the official statement and (2) the closing date. Underwriters should submit official statements to EMMA as quickly as possible after receipt. Be advised that large files can take time to upload and may cause a slow connection speed and the level of traffic on EMMA.



The Effective Date is the date on which the 529 Savings Plan/ABLE Program disclosure document or supplement takes effect, or the effective date of the document being filed.

You may also upload a supplement that has additional information about a document. Select the **Document** tab, from the drop-down menu in the Upload Document box, select the document type: **MFS Disclosure Supplement**. You will then see a pop-up that will state “Select the MFS Disclosure Document with which to associate the Supplement.” If you have multiple documents, clicking the drop-down will display all of the documents the supplement can be associated with.

Select the MFS Disclosure Document with which to associate the Supplement.

Select Disclosure Document ▼

Save Cancel

After associating the supplement with the document you will see the supplement(s) listed with the associated document. If you have more than one supplement, you can reorder the supplements in matter of importance.

Plan

Document

Continuing Disclosure

PDF files must be word-searchable by allowing the user to search for specific terms within the document through a search or similar find function. A single file may not exceed 250 MB. All files in a single submission may not exceed 1 GB. File names longer than 50 characters may be truncated.

Select Files

or drag and drop files here

Test Document.pdf Save Cancel

Description		Date Received from Issuer *	Effective Date	Document Type	
Test Document		10/01/2024		MFS Disclosure Document	
Test Supplement		10/02/2024		MFS Disclosure Document Supplement	

NOTE: The deadline for submission of the official statement to EMMA is the earlier of (1) one business day after receipt of the official statement from the issuer or (2) the issue closing date. Underwriters should submit official statements to EMMA as quickly as possible after receipt. Be advised that large files can take several minutes to upload, depending on your connection speed and the level of traffic on EMMA.

There are certain constraints on documents that can be uploaded. Each plan disclosure document must be a portable document format (PDF) file configured to be saved, viewed, printed and retransmitted by electronic means. The document must also be word-searchable, that is, allowing the user to search for specific terms used within the document through a search or find function available in most standard software packages.

Diagrams, images and other non-textual elements are not required to be word-searchable. If the submitted file is a reproduction of the original document, the submitted file must maintain the graphical and textual integrity of the original document.

Continuing Disclosure Tab

Identify whether the issuer has agreed to undertake to provide continuing disclosure information as specified by Securities and Exchange Commission (SEC) Rule 15c2-12. If the issuer has agreed to undertake to provide continuing disclosure information and such agreement includes an undertaking to provide annual financial information, also enter information relating to the timing set forth in the continuing disclosure undertaking for the submission of annual financial information each year for the issuer.

Submission Status: NOT PUBLISHED

EMMA Dataport - 529 Savings Plan

Resources

Plan

Document

Continuing Disclosure

Continuing Disclosure Information

All applicable fields required for a complete submission.

Issuer or other obligated persons have agreed to undertake to provide Continuing Disclosure Information as contemplated under Exchange Rule 15c2-12:

☐ Yes ☐ No

Save

Preview

Exit

For an issuer, enter such information either as a specific date or as the number of days or months after a specified end date of the issuer's fiscal year.

Submission Status: NOT PUBLISHED

EMMA Dataport - 529 Savings Plan

Resources

Plan

Document

Continuing Disclosure

Continuing Disclosure Information

All applicable fields required for a complete submission.

Issuer or other obligated persons have agreed to undertake to provide Continuing Disclosure Information as contemplated under Exchange Rule 15c2-12: ☒ Yes ☐ No

Issuer Information

Continuing Disclosure Undertaking Information as Contemplated under Exchange Rule 15c2-12 is (select one):

☐ Date by which annual financial information is contractually due to be submitted each calendar year

☐ Number after the end of fiscal - year - end on by which the annual financial information is contractually due to be submitted.

+Add Obligated Person(s) Information

Publishing a Submission

The uploaded document is not yet available to the public. The submission indicator located in the upper left corner of the page denotes whether the submission has been previously published.

Publishing a submission is a two-step process. You first must click **Preview** to review the information entered. To preview the information, click the green **Preview** button. The following screen appears, which allows you to preview all the information you are about to publish.

Submission Status: NOT PUBLISHED

EMMA Dataport - 529 Savings Plan

Please review the submission details before publishing.

Plan/Program

Basic Information

Issuer Name: STATE OF MICHIGAN
Plan Description: MICHIGAN SAVINGS PLAN
Closing Date: 02/17/2021
State: MI

Document

Continuing Disclosure

[Back](#)[Publish](#)[Exit](#)

If any of the required fields are missing or invalid, then a red exclamation will appear next to them and you will not be able to preview. You will receive the following pop-up.

Errors need to be resolved prior to
previewing the submission.

OK

If any information on the Preview screen needs to be changed, click the green **Back** button.

EMMA Dataport - 529 Savings Plan

Please review the submission details before publishing.

Plan/Program

Basic Information

Issuer Name: STATE OF MICHIGAN
Plan Description: MICHIGAN SAVINGS PLAN
Closing Date: 02/17/2021
State: MI

Document

Continuing Disclosure

[Back](#)[Publish](#)[Exit](#)

Once all information is correct and the review is satisfactory, click the **Publish** button. The following screen appears.

Are you sure you want to publish this submission?

[Yes](#)[No](#)

Click **Yes: Publish** and the following confirmation screen appears.

SUBMISSION ID (Q11064524) PUBLISHED SUCCESSFULLY!	
What would you like to do next?	
Duplicate Email Confirmation	
Print Submission	
Start New Submission	

The confirmation screen contains the following:

- A submission ID, which is your unique identifier and helpful for any future updates.
- A link to print your submission confirmation.
- A link to “start new submission” (or to modify your existing submission).
- A link to send your submission confirmation to a secondary email address.

Print/Preview

This screen provides a complete listing of information about the 529 Savings Plan/ABLE Program provided on the EMMA Dataport, the Submission ID, and the date and time of submission for recordkeeping purposes. Submitters are advised to print and save a copy of this screen.



EMMA Dataport - 529 Savings Plan

Submission Id: Q11064906
 Submission Date: 2/4/2021 3:08:01 PM
 You are acting on behalf of: MSRB (MSRB)

Submission Status: Published

Plan/Program

Basic Information

Issuer Name: STATE OF MICHIGAN
 Plan Description: MICHIGAN SAVINGS PLAN
 Closing Date: 02/17/2021
 State: MI

Document

MFS Disclosure Document.pdf Date Received from Issuer: 02/03/2021 Effective Date: 02/17/2021 File Type: MFS Disclosure Document

Continuing Disclosure

Issuer or other obligated persons have agreed to undertake to provide Continuing Disclosure Information as contemplated under Exchange Rule 15c2-12: ☒ Yes ☐ No

Issuer Information

Continuing Disclosure Undertaking Information as Contemplated under Exchange Rule 15c2-12 is:

☒ Date by which annual financial information is contractually due to be submitted each calendar year

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The MSRB will send an electronic receipt to your email address. The receipt contains a complete listing of the submission and a link to view the submission on the EMMA website.

Modifying or Canceling an Existing Submission

To submit a new plan disclosure document or a supplement to an existing plan disclosure document, select the submission type, 529 Savings Plan or ABLE Program that you would like to modify.

Primary Market (Rule G-32) Resources

Underwriting/ Remarketing Submission
(Standard EMMA Submission- 9-digit CUSIP number required)

CreateUpdate

Commercial Paper
(6-digit CUSIP number required)

CreateUpdate

Ineligible for CUSIP Number Assignment

CreateUpdate

Municipal Fund Security

Select

Select

529 Savings Plan

ABLE Program

Other Municipal Fund Security

Advance Refunding Document
(Also known as Escrow Deposit Agreement/ Refunding Agreement etc.)

Pending Submissions

Access completed or partial submissions with expected closing dates on or after today's date

1. From the drop-down menu, select the state that issued the 529 Savings Plan/ABLE Program then click the search button.

EMMA Dataport - 529 Savings Plan Resources

State:

Select State

Search

Exit

2. A list of 529 Savings Plans/ABLE Programs' descriptions for the selected state appears. To update an existing 529 Savings Plan/ABLE Program description, click on the plan description in the table.

EMMA Dataport - 529 Savings Plan

[Resources](#)State:

District of Columbia (DC)

[Add New Plan](#)

529 Plan Description

DISTRICT OF COLUMBIA

Previous **1** Next

3. Click on the **529 Plan or ABLE Program Description** to view the Issue Information. The Plan tab is pre-populated with information from prior 529 plan/ABLE Program submissions. If the plan description is incorrect, change the plan description information.

Submission Status: NOT PUBLISHED

EMMA Dataport - 529 Savings Plan

[Resources](#)

Issue/Series

Official Statement

Continuing Disclosure

All applicable fields required for a complete submission.

Issuer Name: DISTRICT OF COLUMBIA

State: DC

Plan Description: DC COLLEGE SAVINGS PLAN

Closing Date: 09/02/2020



Since 529 Savings Plans/ABLE Programs are sold through a continuous offering and do not have a specific closing date as do other municipal securities, the closing date represents the date the 529 Savings Plan/ABLE Program is first sold to an investor.

- If no other modifications are needed, click on the **Document** tab to upload the primary market disclosure documents.

EMMA Dataport - 529 Savings Plan

[Resources](#)
[Plan](#)
[Document](#)
[Continuing Disclosure](#)

PDF files must be word-searchable by allowing the user to search for specific terms within the document through a search or similar find function. A single file may not exceed 250 MB. All files in a single submission may not exceed 1 GB.


[Select Files](#)

or drag and drop files here

College Savings Plan Disclosure Booklet FINAL.pdf 03/09/2016

Description: 2016 DC 529 College Savin Date Received from Issuer: 02/29/2016 Effective Date: 11/01/2020 MFS Disclosure Document 

Plan Disclosure Booklet Supplement -- FINAL V2.pdf 01/12/2015

Description: 529 Plan Disclosure Booklet Date Received from Issuer: 12/17/2014 Effective Date: 11/01/2020 MFS Disclosure Document Supplement 


[+ Archived Files](#)

During the update process, you may change anything you or your organization previously submitted. You can also add or archive documents. Your designated agent can make the same changes on your behalf. Be sure to **Publish** the updated submission to disseminate the results.


[Select Files](#)

or drag and drop files here

College Savings Plan Disclosure Booklet FINAL.pdf 03/09/2016

Description: 2016 DC 529 College Savin Date Received from Issuer: 02/29/2016 Effective Date: 11/01/2020 MFS Disclosure Document 

Plan Disclosure Booklet Supplement -- FINAL V2.pdf 01/12/2015

Description: 529 Plan Disclosure Booklet Date Received from Issuer: 12/17/2014 Effective Date: 11/01/2020 MFS Disclosure Document Supplement 

MFS Disclosure Document.pdf 02/04/2021

Description: Date Received from Issuer: ! Effective Date: Select Document Type  

[- Archived Files](#)

2015 BR10050-DC 529 Annual Report.pdf	archived 02/04/2021
C 529 Program Disclosure Booklet FINAL (print).pdf	archived 02/04/2021
2013 DC 529 Annual Report Final.pdf	archived 02/04/2021
100813 DC 529 Program Disclosure Booklet FINAL.pdf	archived 02/04/2021

The update process also enables you to cancel the submission of a 529 Savings Plan/ABLE Program document that had been submitted. To cancel the submission, select the **Cancel** button at the bottom of the screen. Canceling your submission will remove it from the public view. You will not be able to restore a canceled submission.

Submission Status: MODIFICATION IN PROGRESS

EMMA Dataport - 529 Savings Plan

Resources

Plan

Document

Continuing Disclosure

All applicable fields required for a complete submission.

Issuer Name: DISTRICT OF COLUMBIA

State: DC

Plan Description: EDITED DC COLLEGE SAVINGS PLAN

Closing Date: 09/02/2020

Cancel Offering

Preview

Exit

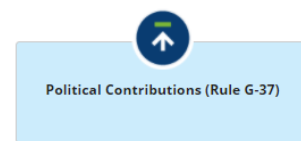
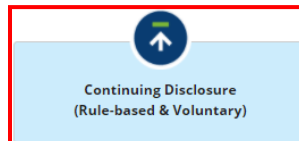
Part 3: Continuing Disclosure Submissions

Creating a New Submission

As with primary market submissions, a submitter must register through Gateway to make continuing disclosure submissions. After registration, log into EMMA Dataport and you will see the Continuing Disclosure (Rule-based & Voluntary) option.

EMMA Dataport

What would you like to do today?



Additional Options

529 Savings Plans / ABLE Programs (Rule G-45)
Submit plan descriptive information, assets and other data.

SHORT Documents (Rule G-34)
Submit ARS and VRDO documents.

Issuer Homepage
Enhance investor relations with a customized EMMA homepage.

After selecting Continuing Disclosure (Rule-Based & Voluntary) the following screen appear. Click **Create New Submission** to start a submission.

Continuing Disclosure

Would you like to make a new continuing disclosure submission or modify an existing one?

Create New Submission

Modify Submission

Recent Submissions

Export Submission History

Most Recent Submissions up to One Year

Show 10 entries | Search within list:

Submission Date	Disclosure Type	Submission ID	Submitted By	
09/22/2020	P&I Payment Delinquency	Q11064552	JDOE3	Modify View

Showing 1 to 1 of 1 entries

Previous 1 Next

Begin by selecting the type of continuing disclosure you will submit – either a Financial/Operating Filing, an Event Filing, or Asset-Backed Securities Filing. (this manual assumes you are submitting a Financial/Operating Filing). Click **Next** to proceed.

Submission Status: NOT YET PUBLISHED


Continuing Disclosure [Resources](#)

What type of filing would you like to submit? (Select one)

☐ Financial/Operating Filing

☐ Event Filing

☐ Asset-Backed Securities Filing

 Not sure?

[Next](#) [Exit](#)

Uploading a Document

After selecting the type of continuing disclosure, click **Next**. The document upload screen appears.

Submission Status: NOT YET PUBLISHED


Continuing Disclosure - Financial/Operating Filing [Resources](#)

What file(s) would you like to submit?

PDF files must be word-searchable by allowing the user to search for specific terms within the document through a search or similar find function.

[Select Files](#)

or drag and drop files here

Test.pdf uploaded 09/22/2020 

[Back](#) [Next](#) [Save](#) [Exit](#)

There are certain constraints on documents that can be uploaded into EMMA Dataport. Each continuing disclosure document must be a portable document format (PDF) file configured to be saved, viewed, printed, and retransmitted by electronic means. The document must also be word-searchable, that is, allowing the user to search for specific terms used within the document through a search or find function available in most standard software packages.

Diagrams, images and other non-textual elements are not required to be word-searchable. If the submitted file is a reproduction of the original document, the submitted file must maintain the graphical and textual integrity of the original document.

Use **Select Files** to locate the file on your computer. Click **Open**, then select the file or drag and drop it to transfer the file to EMMA Dataport. It is important that prior and subsequent to submission, the submitter review each page of the PDF to ensure that it is clear, readable and word-searchable.

EMMA shows that the document has been uploaded by displaying the document name on the left side of the screen and the date uploaded on the right.

Submitting an Annual or Periodic Filing

An annual or periodic filing may be made pursuant to SEC Rule 15c2-12 or may be made voluntarily.

Submission Status: NOT YET PUBLISHED


Continuing Disclosure - Financial/Operating Filing

Resources

Does this submission include information specifically required by a Continuing Disclosure Agreement or other similar commitment consistent with SEC Rule 15c2-12? (Select all that apply.)

☐ SEC Rule 15c2-12 Disclosure

☐ Additional/Voluntary Disclosure

 Not sure?

To submit an annual or periodic filing, select the disclosure type, as shown below. You may select multiple types of disclosure.

Submission Status: NOT YET PUBLISHED

Continuing Disclosure - Financial/Operating Filing

[Resources](#)


Which type of Financial filing best describes this document? Select all that apply.

- SEC Rule 15c2-12 Disclosure

☐ Annual Financial Information and Operating Data (Rule 15c2-12)

☐ Audited Financial Statements or ACFR (Rule 15c2-12)

☐ Failure to Provide Annual Financial Information as Required

 Not sure?

Enter the document title or other descriptive information in the free-text box labeled **Document Description** to provide additional details about the contents of the disclosure. Below the free-text box, enter the period covered by the disclosure. All dates, including the year ended, must be in the format mm/dd/yyyy. You may type the date or select a date from the calendar that appears when you select the field. Both the text and date fields will appear on the EMMA Website in connection with the uploaded document.

Submission Status: NOT YET PUBLISHED

Continuing Disclosure - Financial/Operating Filing

[Resources](#)


What information about this disclosure do you want investors to see on EMMA website?

* is required.

Annual Financial Information and Operating Data (Rule 15c2-12)

Document Description:

Period Date: Year Ended  mm/dd/yyyy *

 Not sure?

Associating Issues or Securities to the Disclosure

Next you need to associate issues or securities to the disclosure. Select 529 Savings Plan or ABLE Program.

Submission Status: NOT YET PUBLISHED

Continuing Disclosure - Financial/Operating Filing

What type of securities do you want to associate with this disclosure?

☐ Municipal Bonds and Notes

☒ Other

Not sure?

Commercial Paper (CUSIP-6 Based)

Ineligible for CUSIP Number Assignment

529 Savings Plan

ABLE Program

Other Municipal Fund Security

Back

Next

Save

Exit

Select the state that you are associating to the submission, and then select the plan description(s) that you are associating to the submission.

Submission Status: NOT YET PUBLISHED

Continuing Disclosure - Financial/Operating Filing

What 529 savings plan would you like to add?

UT

<input type="checkbox"/>	Issuer Name	Plan Description
<input type="checkbox"/>	STATE OF UTAH	MY529

Showing 1 to 1 of 1 entries

Previous 1 Next

Not sure?

Associating Contacts to the Disclosure

A submitter may provide contact information of persons whom the public can ask for further information. After the issues or securities are selected, the following screen appears:

Submission Status: NOT YET PUBLISHED

Continuing Disclosure - Financial/Operating Filing [Resources](#)

What contact information should be posted on the EMMA website?

Submitter's Contact Information

If no issuer/obligated person's contact information is provided, then submitter information will be posted on EMMA.

Organization: MSRB4
Name: JOHN DOE
Address: 22 W st
City, State Zip: alexandria , va 22314
Phone Number: 222-222-2222
Email: jdoe@dealerxyz.comz
Submitter Contact Information can only be edited through MSRB Gateway.

Issuer's Contact Information

[Add new issuer contact](#)

Obligated Person's Contact Information

[Add new obligated person contact](#)

Click the **Add New Issuer Contact** link to add the issuer's contact information. An obligor may not be applicable to issuers of 529 Savings Plans/ABLE Programs.

Issuer's Contact Information

Select Contact ▼ Add new issuer contact

*Organization:

*First Name:

*Last Name:

Address:

City:

State:

Zip Code:

† Phone Number:

Extension:

† Email Address:

Clear Contact Information

Obligated Person's Contact Information

Select Contact ▼ Add new obligated person contact

Back

Next

Exit

You must enter the contact's name and either the phone number or email address. If you do not enter an issuer's contact information, then EMMA will display the submitter's information.

The Issuer contact information entered will need to be entered for each unique submitter. Each submitter must enter its own contact information.

Publishing a Submission

The uploaded document is not yet disclosed to the public on the EMMA Website. You must click **Preview** to disclose the document. After filling out the contact information (if applicable), select the green **Next** button. The following screen appears, which allows you to preview all the information you are about to publish.

Municipal Securities Rulemaking Board 38

Submission Status: NOT YET PUBLISHED

Continuing Disclosure - Financial/Operating Filing

[Resources](#)

This submission has not been published yet. Please review submission details before publishing.

Disclosure Categories

Rule 15c2-12 Disclosure

Annual Financial Information and Operating Data: Test, for the year ended 09/01/2020

Document

File	Period Date
Test.pdf	09/23/2020

529 Savings Plan

Issuer Name	Plan Description
STATE OF UTAH	MY529

Submitter's Contact Information

MSRB4
 Name: JOHN DOE
 Address: 22 W st
 City, State Zip: alexandria , va 22314
 Phone Number: 222-222-2222
 Email: jdoe@dealerxyz.comz

Issuer's Contact Information

Obligated Person's Contact Information

[Back](#)[Save and Print for Review](#)[Publish](#)[Exit](#)

If any information on the Preview screen needs to be changed, click either the **Pencil icon** or the **Back** button until you reach the screen where the data was inputted. Once all information is correct, click **Publish**. The following pop-up appears.

Are you sure you want to publish?

[Yes](#)[No](#)

You may resume editing the document by clicking **No** or publish it by clicking **Yes**. When you publish a submission, a confirmation email will be sent to the submitter.

The confirmation screen gives the submitter a submission ID, as well as a chance to send a duplicate confirmation email by selecting the link and entering a separate email address.

Submission Status: PUBLISHED

SUBMISSION ID (Q11064712) PUBLISHED SUCCESSFULLY!

What would you like to do next?
Duplicate Email Confirmation
Print Submission
Start New Submission

This screen also gives the submitter a print/preview screen to allow the submitter to view their published submission. The submitter should select the print/preview button to retain a hard-copy record of the submission.



Submission ID: Q11064712
 Submission Date: 12/11/2020 4:21 PM
 Status: PUBLISHED

Disclosure Categories	
Rule 15c2-12 Disclosure	
Annual Financial Information and Operating Data: Test, for the year ended 12/15/2020	
Document	
File	Period Date
Test (2).pdf	12/11/2020
529 Savings Plan	
Issuer Name	Plan Description
STATE OF ALASKA	JOHN HANCOCK FREEDOM 529
Submitter's Contact Information Issuer's Contact Information Obligated Person's Contact Information MSRB4 Name: JOHN DOE Address: 22 W st City, State Zip: alexandria , va 22314 Phone Number: 2222222222 Email: jdoe@dealerxyz.comz	

Part 4: Issuers Voluntary Basis Primary Market Submissions

EMMA Dataport provides the capability for issuers of municipal securities to submit primary market documents and related information on a voluntary basis. Such documents include 529 Savings Plan/ABLE Program disclosure documents voluntarily submitted by issuers of state 529 Savings Plans/ABLE Programs.

These 529 Savings Plans/ABLE Programs may be submitted to EMMA so that a state issuer can disclose 529 Savings Plans/ABLE Programs sold directly to investors without the assistance of a dealer.

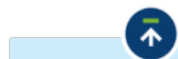


Voluntary submissions made by issuers of 529 Savings Plan/ABLE Program disclosure documents do not relieve underwriters of their submission obligations related to plan disclosure documents under MSRB Rule G-32, to the extent applicable.

1. To submit a 529 Savings Plan/ABLE Program disclosure document go to EMMA Dataport and click the tab labeled **Issuer Voluntary Official Statements**.

EMMA Dataport

What would you like to do today?



Primary Market (Rule G-32)



Continuing Disclosure
(Rule-based & Voluntary)



Political Contributions (Rule G-37)

Additional Options

529 Savings Plans / ABLE Programs (Rule G-45)

Submit plan descriptive information, assets and other data.

SHORT Documents (Rule G-34)

Submit ARS and VRDO documents.

Issuer Voluntary Official Statements

Submit official statement or related information to make a voluntary primary market submission.

Preliminary Official Statement and Pre-Sale Documents

Submit POS and related pre-sale documents.

Voluntary Financial Information: Timing, GAAP Undertaking & URL

Indicate the timing, accounting standard and URL for additional financial information.

2. Next, select the option from Municipal Fund Security drop down (529 Savings Plan or ABLE Program).

Issuer Voluntary Official Statements Resources

Submit official statement or related information to make a voluntary primary market submission.

Why submit voluntary official statements ?

Bond/ Note/ Variable Rate
(Standard EMMA Submission- 9-digit CUSIP number required)

CreateUpdate

Commercial Paper
(6-digit CUSIP number required)

CreateUpdate

Ineligible for CUSIP Number Assignment

CreateUpdate

Municipal Fund Security

Select

Select529 Savings PlanABLE ProgramOther Municipal Fund Security

Advance Refunding Document
(Also known as Escrow Deposit Agreement/ Refunding Agreement etc.)

3. Select the state for which you are making the 529 Savings Plan/ABLE Program disclosure and then click the Search button.

529 Savings Plan (Voluntary Official Statement) Resources

Search for a Plan

State: Select State

Search

Exit

If information about a 529 Savings Plan/ABLE Program in a state has previously been submitted by an underwriter, issuer or a designated agent, the plan name will be displayed. 529 Savings Plans/ABLE Programs that are not listed as modifiable are listed for reference only and cannot be modified by an issuer.

To modify an existing plan, click the plan/program description. Issuers can only modify plans submitted by issuers.

Adding a New 529 Savings Plan/ABLE Program

To create a new plan disclosure document, click **Add New Plan** from the list of 529 Savings Plan/ABLE Program descriptions. You will be directed to the **Plan** tab.

529 Savings Plan (Voluntary Official Statement)

Resources

Search for a Plan

State: DC Search

Search Results for District of Columbia (DC)

Add New Plan

529 Plan Description
DC COLLEGE SAVINGS PLAN

Previous

1

Next

Exit

View the issue information on the **Plan** tab. The state and the full issuer name fields will be pre-populated.

Submission Status: NOT PUBLISHED

529 Savings Plan (Voluntary Official Statement)

Resources

Plan

Document

Continuing Disclosure

All applicable fields required for a complete submission.

Issuer Name: DISTRICT OF COLUMBIA

State: DC

Plan Description:

Closing Date:

Preview

Exit

Enter the plan description information and the plan disclosure closing date. The plan description describes the type of 529 Savings Plan/ABLE Program. It is important to describe the plan accurately since this information appears on the public website and informs investors about the plan.



Since 529 Savings Plans/ABLE Programs are sold through a continuous offering and do not have a specific closing date as other municipal securities do, the closing date represents the date the 529 Savings Plan/ABLE Program is first sold to an investor.

Submission Status: NOT PUBLISHED

529 Savings Plan (Voluntary Official Statement)

Resources

Plan

Document

Continuing Disclosure

All applicable fields required for a complete submission.

Issuer Name: DISTRICT OF COLUMBIA

State: DC

Plan Description:

Closing Date:



Continuing Disclosure Tab

On the Continuing Disclosure Information tab, click the **No** button. 529 Savings Plan/ABLE Program disclosure documents that are voluntarily submitted by issuers are not subject to SEC Rule 15c2-12, and therefore the **Yes** option does not apply.

If the issuer agreed to provide continuing disclosure information as outlined by SEC Rule 15c2-12, then the submission is not voluntary and the Continuing Disclosure information must be submitted using the Primary Market tab. Refer to the Making a Primary Market Submission section.

Submission Status: NOT PUBLISHED

529 Savings Plan (Voluntary Official Statement)

[Resources](#)

Plan

Document

Continuing Disclosure

Continuing Disclosure Information

All applicable fields required for a complete submission.

Issuer or other obligated persons have agreed to undertake to provide Continuing Disclosure Information as contemplated under Exchange Rule 15c2-12:

☐ Yes | ☒ No

Preview

Exit

Uploading a Document

Click on the **Document** tab. From the drop-down menu in the Upload Document box, select the document type: **MFS Disclosure Document**.

You may optionally enter a document description. Next, enter the Document Effective Date and click **Select Files** to navigate to the location of the file on your computer. You can also drag and drop files.



The file must be in word-searchable PDF format.

Submission Status: NOT PUBLISHED

529 Savings Plan (Voluntary Official Statement)

[Resources](#)[Plan](#) [Document](#) [Continuing Disclosure](#)

PDF files must be word-searchable by allowing the user to search for specific terms within the document through a search or similar find function. A single file may not exceed 250 MB. All files in a single submission may not exceed 1 GB.

[Select Files](#)

or drag and drop files here

MFS Disclosure Document.pdf 02/04/2021

Description: Effective Date: Select Document Type 

NOTE: The deadline for submission of the official statement to EMMA is the earlier of (1) one business day after receipt of the official statement from the issuer or (2) the issue closing date. Underwriters should submit official statements to EMMA as quickly as possible after receipt. Be advised that large files can take several minutes to upload, depending on your connection speed and the level of traffic on EMMA.

It is recommended that the plan disclosure document comprises a single file. If it is necessary to upload multiple files to provide the complete plan document, then click the **Select Files** button to continue uploading files until you have a complete plan.

After you upload the 529 Savings Plan/ABLE Program document, the document link, description, effective date, and type will be available to enter below the upload box.

Submission Status: NOT PUBLISHED

529 Savings Plan (Voluntary Official Statement)

[Resources](#)[Plan](#) [Document](#) [Continuing Disclosure](#)

PDF files must be word-searchable by allowing the user to search for specific terms within the document through a search or similar find function. A single file may not exceed 250 MB. All files in a single submission may not exceed 1 GB.

[Select Files](#)

or drag and drop files here

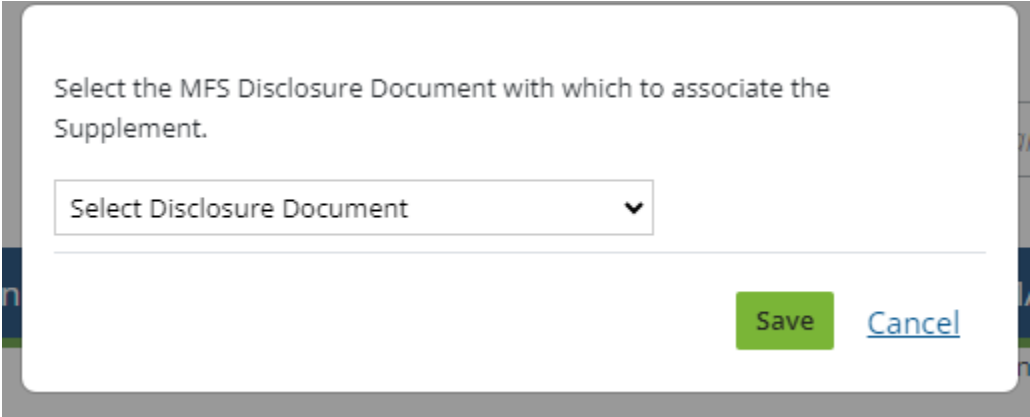
MFS Disclosure Document.pdf 02/04/2021

Description: Effective Date: Select Document Type 

NOTE: The deadline for submission of the official statement to EMMA is the earlier of (1) one business day after receipt of the official statement from the issuer or (2) the issue closing date. Underwriters should submit official statements to EMMA as quickly as possible after receipt. Be advised that large files can take several minutes to upload, depending on your connection speed and the level of traffic on EMMA.

You may also upload a supplement that has additional information about a document. Select

the **Document** tab, from the drop-down menu in the Upload Document box, select the document type: **MFS Disclosure Supplement**. You will then see a pop-up that will state “Select the MFS Disclosure Document with which to associate the Supplement.” If you have multiple documents, clicking the drop-down will display all of the documents the supplement can be associated with.



After associating the supplement with the document you will see the supplement(s) listed with the associated document. If you have more than one supplement, you can reorder the supplements in matter of importance.

EMMA Dataport - 529 Savings Plan Resources

PlanDocumentContinuing Disclosure

PDF files must be word-searchable by allowing the user to search for specific terms within the document through a search or similar find function. A single file may not exceed 250 MB. All files in a single submission may not exceed 1 GB. File names longer than 50 characters may be truncated.

Select Files

or drag and drop files here

Test Document.pdfSaveCancel

Description		Date Received from Issuer *	Effective Date	Document Type	
Test Document		10/01/2024		MFS Disclosure Document	
Test Supplement		10/02/2024		MFS Disclosure Document Supplement	

NOTE: The deadline for submission of the official statement to EMMA is the earlier of (1) one business day after receipt of the official statement from the issuer or (2) the issue closing date. Underwriters should submit official statements to EMMA as quickly as possible after receipt. Be advised that large files can take several minutes to upload, depending on your connection speed and the level of traffic on EMMA.

Publishing a Submission

Information is not published on the EMMA website until you publish your submission. The **Preview** screen will display all the information you have entered for review before you **Publish**. You may update the information entered by clicking the **Back** button before you publish.

529 Savings Plan (Voluntary Official Statement)

Please review the submission details before publishing.

Plan/Program

Basic Information

Issuer Name: DISTRICT OF COLUMBIA
Plan Description: DC SCHOOL DISTRICT SAVINGS PLAN
Closing Date: 08/22/2022
State: DC

Document

Continuing Disclosure

[Back](#)[Publish](#)[Exit](#)

If any of the required fields are missing or invalid, then a red exclamation will appear next to them, and you will not be able to preview. You will receive a pop-up with the following message, “Errors need to be resolved prior to previewing the submission.”

Errors need to be resolved prior to
previewing the submission.

[OK](#)

When the data files are satisfactory, click **Publish**, and then click **Yes** when the pop-up appear. Or **No** if some changes still need to be made.

Are you sure you want to publish?

Yes

No

EMMA displays the following screen, which includes the Submission ID. You will need this ID to make updates later. Save the email confirmation from EMMA, which contains the submission ID, or save the submission ID separately.

SUBMISSION ID (Q11064524) PUBLISHED SUCCESSFULLY!

What would you like to do next?

[Duplicate Email Confirmation](#)

[Print Submission](#)

[Start New Submission](#)

Modifying or Canceling a Voluntary Submission

To modify a voluntary submission, select the **529 Savings Plan/ABLE Program** from Municipal Fund Security dropdown.

Select the state and find the 529 Savings Plan/ABLE Program disclosure document you wish to modify.

The screenshot shows the '529 Savings Plan (Voluntary Official Statement)' interface. At the top right is a 'Resources' button. Below the title is a search bar labeled 'Search for a Plan'. Under the search bar, there is a 'State:' dropdown menu set to 'DC' and a green 'Search' button. Below this, the search results are displayed for 'District of Columbia (DC)'. The results table has a header '529 Plan Description' and two entries: 'DC COLLEGE SAVINGS PLAN' (highlighted with a red box) and 'DC SCHOOL DISTRICT SAVINGS PLAN'. To the right of the search results is a '+Add New Plan' link. At the bottom right of the results section are 'Previous', '1', and 'Next' links. At the very bottom of the interface is a light blue bar with an 'Exit' button on the right.

529 Savings Plan (Voluntary Official Statement) [Resources](#)

Search for a Plan

State: DC [Search](#)

Search Results for District of Columbia (DC) [+Add New Plan](#)

529 Plan Description
DC COLLEGE SAVINGS PLAN
DC SCHOOL DISTRICT SAVINGS PLAN

Previous 1 Next

[Exit](#)

During the update process, you may change anything you or your organization previously submitted. You can add or archive documents. Your designated agent can make the same changes on your behalf. Be sure to **Publish** the updated submission to disseminate the results.

Submission Status: MODIFICATION IN PROGRESS

529 Savings Plan (Voluntary Official Statement)

[Resources](#)

Plan

Document


Continuing Disclosure

PDF files must be word-searchable by allowing the user to search for specific terms within the document through a search or similar find function. A single file may not exceed 250 MB. All files in a single submission may not exceed 1 GB.

Select Files

or drag and drop files here

MFS Disclosure Document.pdf 02/04/2021

Description: Effective Date: 02/19/2021 MFS Disclosure Document 

MFS Disclosure Document.pdf 02/04/2021

Description: Effective Date: Select Document Type 

The update process also enables you to cancel a 529 Savings Plan/ABLE Program document that your organization has submitted. To do so, select the **Cancel** button at the bottom of the screen. Canceling your submission will remove it from public view. You will not be able to restore a canceled submission.

Submission Status: MODIFICATION IN PROGRESS

529 Savings Plan (Voluntary Official Statement)

[Resources](#)

Plan

Document


Continuing Disclosure

All applicable fields required for a complete submission.

Issuer Name: DISTRICT OF COLUMBIA

State: DC

Plan Description: DC SCHOOL DISTRICT SAVINGS PLAN

Closing Date:  08/22/2022

Cancel Offering

Preview

Exit